



## halFILE 2.1

### Technical Support and Installation

### Help Us Help You

- What module are you using: scan, index, archive, search, etc
- What is the exact error number and error message?
- What is the caption (in the blue bar of the error window)?
- Please provide the application id, database id, basket, and halFILE document number if applicable
- If it occurs regularly can you detect any kind of pattern?
- Does the problem exist on more than one workstation?
- Schedule major upgrades in advance



### Remote Access

- Take advantage of a high-speed Internet connection to eliminate long distance charges and improve response
- Install a new modem
- Test line condition
- Don't have PCAnywhere – use VNC
- Use Remote Desktop on Windows XP
- Remove backgrounds / themes



### Remote Access Issues

- Windows 2000 – PCAny 9.2 or higher
- Windows XP – PCAny 10.5 or higher
- Set acceleration to compatibility
- Open firewall or “dial” us



### Call Tracking

- halFILE Tech Support database
- Weekly hot-sheet
- Reasonable response
- Voice mail
- Email us at [support@halfile.com](mailto:support@halfile.com)
- Knowledge Base is published on [www.halfile.com](http://www.halfile.com)



### E.B.F. / Releases

- Improved quality control
- Problems with no workaround or that prevent you from doing business will be fixed and released as emergency bug fixes (E.B.F.'s)
- An official maintenance release will be available once a year
- A major release will be available each year.
- Simplified delivery method



## Minimum System Requirements

- PC with 300 megahertz or higher processor
- 128 megabytes (MB) of RAM or higher recommended (64 MB minimum supported; may limit performance and some features)
- 1.5 gigabytes (GB) of available hard disk space
- Super VGA (800 × 600) or higher-resolution video adapter
- 17" monitor or larger
- CD-ROM or DVD drive
- Keyboard and Mouse



## Recommended System Specifications

- Intel Pentium 4 1.5 Ghz or higher processor
- 256 megabytes (MB) of RAM or higher
- 1.5 gigabytes (GB) of available hard disk space
- Super VGA (1024 × 768) or higher-resolution video adapter
- 19" monitor or larger
- CD-ROM or DVD drive
- Internet Keyboard
- Microsoft Wheel Mouse with IntelliPoint software



## Upgrade Review

- Do you have any Access databases? If so, migrate to SQL, MSDE, or Sybase, or other client/server ODBC database
- What version of halFILE are you running? Require 1.4.x before you go to 2.1
- Archive and review all baskets
- Scanner make/model and interface



## What version of Crystal?

- Crystal Report 9.0 just released
- Crystal 8.0 and 8.5
- Crystal 7
- Earlier versions you can print reports but not modify / design
- Old reports will be converted by hal



## Custom Programming

- Import routines are the most common
- Look for icons other than halFILE that you use as part of your procedures
- "Flow" programs that move data from one location or database to another
- Does any data and/or images originate outside of halFILE (i.e. from the county or other 3<sup>rd</sup> party)



## OS Requirements

- Windows 95
  - Y2K Update
  - Internet Explorer 4.01 SP2
- Windows 98
  - Y2K Update 2
  - Internet Explorer 4.01 SP2
- Windows 98 Second Edition
- Windows Millennium
- Windows NT 4
  - SP6 (or greater)
  - IE 4.01 SP2
- Windows 2000
  - SP2 recommended
- Windows XP
  - SP1 recommended



## Imaging Requirement

- Early versions of Windows 95
  - Download available for Imaging
- Windows 95/98/ME/NT/2000
  - Add through Windows Setup in control panel
- Windows XP
  - Kofax viewer installed automatically or you may elect to purchase Imaging Professional



## KOFAX Scanning

- KF series (9200, 9210, 9250, 9275, 7300)
  - Install KF Hardware Runtime from cd
- Adrenaline (850, 1700)
  - Install Adrenaline Hardware Runtime from cd
- Adrenaline Software
  - Requires Kofax cd and hardware key
  - May require upgrade if Imaging Pro scan stations exist
- Uses same familiar scan module but it has been integrated into halFILE 2.1 manager



## TWAIN (non-Kofax) Scanning

- TWAIN scan module replaces ISIS scanning
- Requires TWAIN driver from scanner manufacturer
- Test with Imaging For Windows
- New interface integrated into halFILE 2.1 manager



## TWAIN Issues

- If you do not have Imaging Professional you will need to experiment with whether or not you have to check the box that displays the TWAIN dialog prior to each scan
- You may need to check the image preview if you do not see the images as they are being scanned
- Some TWAIN drivers do not support UNC paths or long filenames for baskets. We will provide a workaround in a future release
- Need to double check file size and file format to ensure Group IV Tiff and that file is in the 25-60k range



## HFW20 Issues

- Altering location of HFW20
  - UNC
  - Drive letter
  - Folder
- Registered COM server during installation



## Printing Issues

Images print fast but page is solid black

- Obtain latest printer driver from manufacturer
- Install Diamond Compatible 9300k G2.2.icm color profile in color management tab of printer settings



## Display Issues

Images display in all black but can be viewed on other stations without issue

- Change scaling option on viewer
- Obtain latest video card driver
- Add Diamond Compatible 9300k G 2.2.icm color profile to color management tab of video card settings
- Kofax inverted images can only be displayed on Kodak viewer
- Kodak inverted images can be displayed on Kofax or Kodak



## Windows XP Issues

- Imaging Professional required for TWAIN scanning
- Imaging Professional required for import
- Imaging Professional required for new viewer features
  - Annotations
  - Crop
  - Deskew
  - Despeckle
  - Invert
  - OCR
- Free Kofax based viewer with 1.4 functionality available (installed by default)
- XP Home not supported
- XP 64-bit edition not tested
- Check compatibility with all hardware / software you use
- We are working on a solution for distributing Imaging Standard in the near future



## Terminal Server Issues

- Windows 2000 SP3 – issue with printing unless you launch 2.1 with UNC path
- No longer need to administer ODBC settings for new users
- Improved installation removes need for individual user settings
- Requires special licensing from hal

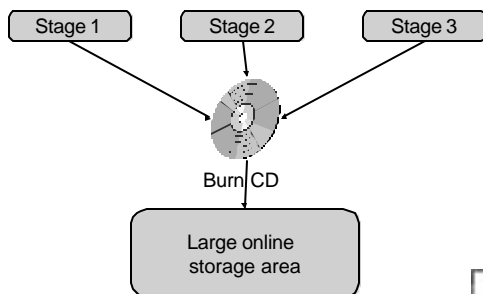


## Archive Configuration

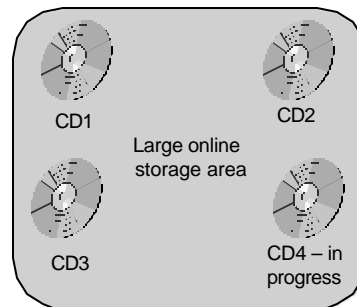
- Keep or get rid of staging areas?
- Automatic vs. manual cartridge creation
- Configuring your first archive after upgrade
- Configuring email notifications
- Importance of maintaining backup / permanent backup strategy for online storage area



## Previous Archive method



## New Archive Method



## Archive Backup Strategy

- Email notification that cartridge is full
  - Create permanent backup of corresponding folder (i.e. CD1)
  - Test permanent backup and ensure you have multiple copies with at least one off-site
  - Modify tape backup to exclude what you have on permanent backup
  - Modify tape backup to include any new / incomplete cartridges



## Can halFILE 2.1 and 1.4 co-exist?

No, because the Access tables are migrated to an ODBC database for 2.1



## Remote scan station issues

- Scan stations will need to be upgraded and moved onto a SQL back-end such as MSDE
- To upgrade, we will need remote access to the workstation if possible
- Optionally could leave on 1.4



## Remote index stations

- Using export.exe in place of copying databases
- PCAny remotes should be fine
- Terminal Server remotes should be fine
- RAS/DUN remotes will require local upgrade
- Removable media procedures need to be reviewed case by case
- Index directly via IP and the Internet



## Audit

Program being developed to perform the following audits:

- Scanner make and interface
- Database platform
- Crystal version
- halFILE version
- Location of database files



## hal Systems site review

- Send us your upgrade review form
- We will “dial” in and perform our own final review before your upgrade
- We will assist you in any halFILE issues that arise
- We can perform the upgrade for you as long as you schedule in advance
- If you have multiple and/or remote sites this is an especially important review



## Installation Issues

- Install to same directory as 1.4 or move to new location?
- Change destination directory to shared directory on network
- Combines all previous features that needed to be run separately – Crystal Runtime, 32-bit report layer, send to halFILE, sql client, printer driver, etc
- Sybase users will need to install database client on workstations
- Most stations use “typical” install
- Windows 95 requires “custom” install for MDAC 2.6



## Upgrade Wizard

There is an upgrade wizard that will move all of your current settings from 1.4 to 2.1.

- Audit must have already been performed
- All databases must be migrated to SQL
- A complete backup of 1.4 must be performed prior to running the upgrade



## Backup

- As a service, hal will review your backup procedures to ensure halFILE databases and images can be successfully recovered
- Backups are your responsibility
- Backups are IMPORTANT!!



## halFILE 2.1

Remember, we are here to help you!

877-HAL-FILE

